



Individual & Business Solutions Made Simple

# Five Core Questions for Comprehensive Planning

Answer each question below and then rank them by order of importance to your overall financial plan.

(One being most important and five least important)

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|--|------------------|--|
| <p><b>1. Business Transition Planning</b><br/>Have you created a plan to transfer your business to a certain party at an agreed upon price?</p>          | <p>Yes    No</p> | <p>Rank</p> <input style="width: 40px; height: 30px; border: 1px solid #008080;" type="text"/> |
| <p><b>2. Business Preservation</b><br/>Have you considered the impact on your business due to the departure or death of a key employee?</p>              | <p>Yes    No</p> | <p>Rank</p> <input style="width: 40px; height: 30px; border: 1px solid #008080;" type="text"/> |
| <p><b>3. Wealth Accumulation</b><br/>Have you considered how to minimize the impact of taxes in attaining your personal wealth and retirement goals?</p> | <p>Yes    No</p> | <p>Rank</p> <input style="width: 40px; height: 30px; border: 1px solid #008080;" type="text"/> |
| <p><b>4. Estate Planning</b><br/>Has the successful transfer of your legacy to family or charity been considered in your planning?</p>                   | <p>Yes    No</p> | <p>Rank</p> <input style="width: 40px; height: 30px; border: 1px solid #008080;" type="text"/> |
| <p><b>5. Executive Benefits</b><br/>Are there proactive steps you must take to retain, reward and recruit key employees?</p>                             | <p>Yes    No</p> | <p>Rank</p> <input style="width: 40px; height: 30px; border: 1px solid #008080;" type="text"/> |

***Talk to your financial professional to see how North American can help you achieve your goals.***

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